

MISSOURI DIVISION OF TOURISM

ANNUAL REPORT 2019

MISSOURI
enjoy the show



TABLE OF CONTENTS

04

STRATEGIC
PLAN

09

PAID MEDIA
CAMPAIGN

14

COOPERATIVE
MARKETING

05

THE MISSOURI
TOURISM
STORY

10

EARNED
MEDIA EFFORTS

15

INTERNATIONAL/
DOMESTIC GROUP

06

BY THE
NUMBERS

11

SHARED
MEDIA EFFORTS

16

FILM OFFICE

07

TOP STATES
VISITATIONS

12

OWNED
COMMUNICATIONS
ASSETS

18

TOURISM
EXPENDITURES
AND EMPLOYMENT
BY COUNTY

08

VISITOR
ACTIVITIES/
DESTINATIONS

13

WELCOME
CENTERS



STRATEGIC PLAN

VISION

Strengthen Missouri communities through the power of travel.

MISSION

We showcase Missouri experiences through compelling storytelling to inspire travel, support healthy communities and strengthen our economy.

VALUES

- **Purposeful:** We are intentional in our strategy.
- **Collaborative:** We welcome all voices, and teamwork is at the center of what we do.
- **Innovative:** We take leaps and act courageously.
- **Flexible:** We encourage a resilient spirit that is open to change.
- **Loyal:** We care for our community, partners and customers.

IMPERATIVES

- Innovate Marketing Strategies
- Unify and Educate Stakeholders
- Secure Long-Term, Sustainable Funding
- Optimize the Missouri Division of Tourism as an Organization



THE MISSOURI TOURISM STORY

In 1967, the 74th General Assembly created the Missouri Tourism Commission and its administrative arm — the Missouri Division of Tourism (MDT) — to steward the development of the tourism industry.

MDT highlights the state's diverse tourism assets through a research-based, comprehensive strategic marketing plan that includes a diversified paid media campaign, proactive public relations initiatives, planning tools and social media management. In addition, MDT directly supports the industry in many of our communities through a cooperative marketing program.

As one of Missouri's largest industries, the travel industry can have a significant impact on the state's overall economic health. In FY19, visitor spending generated an estimated \$1.46 billion in state and local taxes, offsetting the Missouri resident's tax burden by an average of \$611 per household.

Simply put, a consistent investment in tourism is crucial to enhancing the state's image, strengthening our communities and boosting Missouri's bottom line.

BY THE NUMBERS

42.9
MILLION

Number of visitors

\$17.7
BILLION

Economic impact
of Missouri Tourism
industry

2.1
MILLION

Total visits
to VisitMO.com

\$3.21

State tax revenue
received by Missouri
for every dollar
in MDT's budget

\$76

Visitor expenditures in
Missouri's businesses for
every dollar invested in
MDT's budget

\$290

Amount spent per person
per overnight trip

304,329

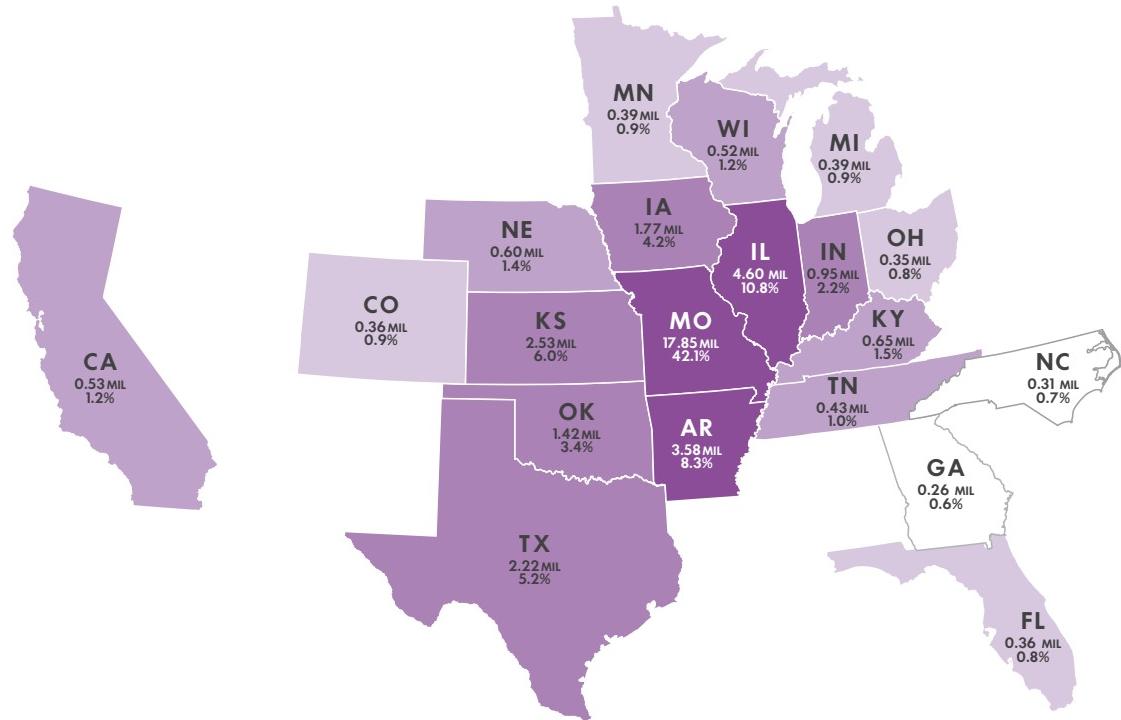
Missourians directly
employed in tourism

307,096

Travelers visiting official
Missouri Welcome Centers*

*Missouri Welcome Centers were mainly closed on weekends
from August 2017 through April 2019.

TOP STATES VISITATIONS



MISSOURI SOURCE MARKETS BY SHARES

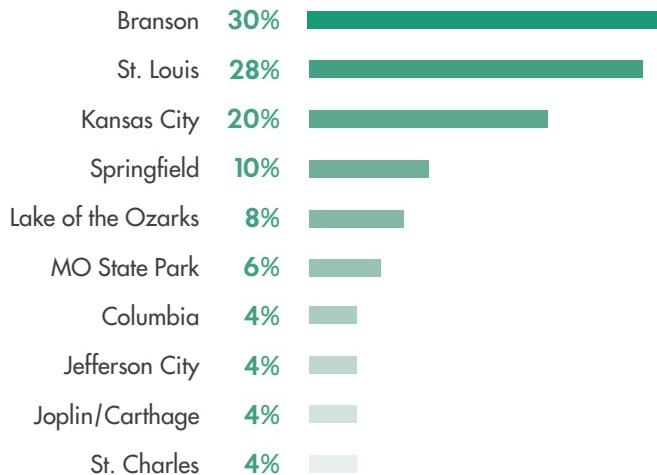
- Less than 0.8%
- 0.8% to < 1.0%
- 1.0% to < 2.0%
- 2.0% to < 7.0%
- More than 7.0%

VISITOR ACTIVITIES/DESTINATIONS

ACTIVITIES



DESTINATIONS



PAID MEDIA CAMPAIGN

In CY19, MDT's increased budget allowed paid media to increase to 72% of the budget and included a return to broadcast television. With these additional resources, MDT's messaging was able to make more of an impact, as outlined in the 2019 Marketing Effectiveness study:

"Both image ratings and likelihood to visit recovered, and these results show the benefit of re-extending the welcome to travelers. The challenge presented by reduced funding was that less marketing resulted in a fall in top-of-mind awareness of the destination."

CALENDAR YEAR ALLOCATION BY YEAR — PAID ADVERTISING ONLY

MEDIA	2015	2016	2017	2018	2019
Television	\$7,279,068	\$5,659,942	\$894,326	\$300	\$1,784,283
Online	\$3,162,913	\$2,072,352	\$1,362,315	\$1,073,215	\$1,134,004
Magazines	\$2,075,701	\$2,350,896	\$944,973	\$600,411	\$713,678
Promotions/Other	\$712,056	\$640,396	\$1,755,886	\$1,812,847	\$44,100
TOTAL	\$13,229,738	\$10,723,586	\$4,957,500	\$3,486,773	\$3,676,065

The number of aware households from the paid effort increased 97% over the previous year, while the aware households from the total PESO (Paid, Earned, Shared, Owned) effort increased 54%. This was all achieved with an 18% budget increase.

AWARE HOUSEHOLDS

TYPE	2016	2017	2018	2019	DIFFERENCE
Advertising Aware HHs	16.6 million	5.5 million	6.9 million	13.6 million	97%
Aware HHs — Advertising/PR/Social	20.6 million	8.9 million	9.9 million	14.6 million	54%

MDT's advertising efforts generated almost \$756 million in incremental visitor spending, and the economic impact represents a 63% increase compared to 2018.

ADVERTISING ONLY	2016	2017	2018	2019	DIFFERENCE
Incremental Trips	1,046,883	497,182	494,525	701,845	42%
Incremental Visitor Spending	\$1,204,945,085	\$511,102,941	\$462,875,400	\$755,982,901	63%

EARNED MEDIA EFFORTS

Writers from around the world turned their attention to Missouri in 2019 to highlight new attractions and favorite places. MDT's public relations efforts provided international, national and regional journalists with insight and images from the Show-Me State. The 50th anniversary of the National Churchill Museum in Fulton, a new national historic park coming to Ste. Genevieve, family-friendly fun at Elephant Rocks State Park, popular stops along Route 66 and much more were featured in dozens of print and digital publications, including USA Today, Parents Magazine, Midwest Living, Chicago Tribune and Outside Online.

"Recall of earned media was 23% this year up from 18% in all of 2018. Earned media extended the reach of the campaign to an additional 5.5% of the population — an additional 746,760 people."



SHARED MEDIA EFFORTS

TOP POSTS FOR FY19

INSTAGRAM



IMPRESSIONS: 23,128
ENGAGEMENTS: 2,165
ENGAGEMENT RATE: 9.3%

IMPRESSIONS: 17,428
ENGAGEMENTS: 1,806
ENGAGEMENT RATE: 10.3%

IMPRESSIONS: 15,751
ENGAGEMENTS: 1,391
ENGAGEMENT RATE: 8.8%

FACEBOOK

IMPRESSIONS: 208,701
ENGAGEMENTS: 9,844
ENGAGEMENT RATE: 4.72%

DURING THE SPRING,
REACH OF SHARED
MEDIA WAS 46%
BY THE END OF 2019,
THIS ROSE TO 59%



MISSOURI'S OWNED COMMUNICATIONS ASSETS

Beautiful images and a well-turned phrase help tell Missouri's story and inspire visitors to add Missouri to their bucket list. The MDT communications team created more than 600 pieces of content in FY19 for VisitMO.com, the Visit Missouri social media channels, the annual travel guide, email newsletters and public relations. In addition, more than 1,000 high-quality images and video footage were produced, highlighting Missouri's attractions, festivals, outdoor beauty and adventures.

In 2019, the annual official Missouri Travel Guide highlighted new attractions in the state, added a fun graphic illustrating what visitors should pack for a vacation in Missouri and incorporated clever user-generated photos and comments to show what people who visit and love the Show-Me State have to say about it. The MDT team that produces the guide is dedicated to keeping it fresh and interesting year to year. Subsequent to the release of the 2019 Travel Guide, a survey showed that readers are very impressed with the quality of the publication and its balance of articles and listings, and state it is instrumental in their vacation planning.

Consumer email newsletters are produced monthly, and in FY19, the average open rate was 10.5% with an average click rate of .9%.



VISITMO.COM

TOTAL USERS:	1,677,061
NEW USERS:	1,651,228
SESSIONS:	2,118,241
NUMBER OF SESSIONS PER USER:	1.26
PAGE VIEWS:	3,584,294
PAGE/SESSION:	1.69
AVG. SESSION DURATION:	00:01:41
BOUNCE RATE:	48.02%

WELCOME CENTERS

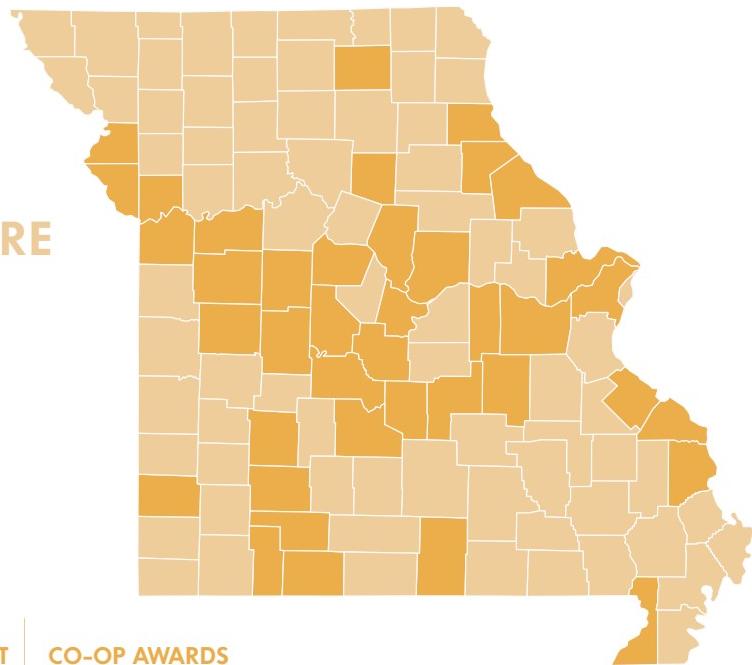


307,096
TOTAL VISITORS
SERVED AT OFFICIAL
WELCOME CENTERS

COOPERATIVE MARKETING

The Cooperative Marketing Program continues to represent the division's second-largest investment each year. The funds are provided to Destination Marketing Organizations through three separate matching programs. These programs provide marketing, resources and partnership opportunities statewide to increase both visitation and visitor spending.

40
COUNTIES WERE
REPRESENTED
IN FY19



YEAR	MDT BUDGET	CO-OP AWARDS
2015	\$21,896,240	\$2,624,517
2016	\$20,804,990	\$2,761,251
2017	\$20,714,990	\$3,440,441
2018	\$10,619,990	\$1,803,981
2019*	\$15,262,233	\$2,801,730

*In 2019, the Search Engine Marketing Partnership was included in the Co-op Program.

INTERNATIONAL/DOMESTIC GROUP

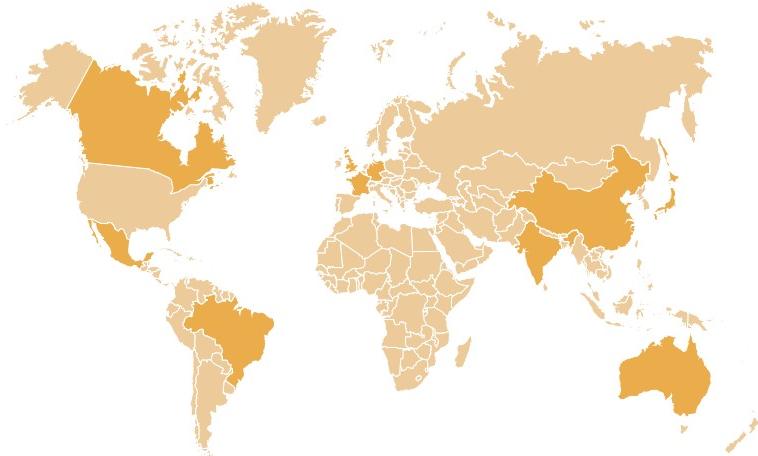
MDT continued its efforts in the Domestic Tour and Travel/International marketing segments in fiscal year 2019. MDT's contractor, Legacy Dimensions, represented the state at a variety of trade shows, planned and executed sales missions with our industry partners and participated in cooperative agreements with tour operators and U.S.-based receptive companies that focus on in-bound international travel.

Through our membership in Travel South USA (TSUSA), MDT continued to participate in regional marketing efforts targeting international travelers. TSUSA offers Global Partnership Programs in selected markets that employ in-country representation firms to help carry the message. MDT participated in the Australia and Nordic programs.

MDT also continued partnering with Brand USA, the destination marketing organization for the United States, and maintained its membership in Mississippi River Country, a consortium of states along the river that markets to Japan and South Korea.

TOP 10 COUNTRIES FOR INTERNATIONAL TRAVELERS IN MO

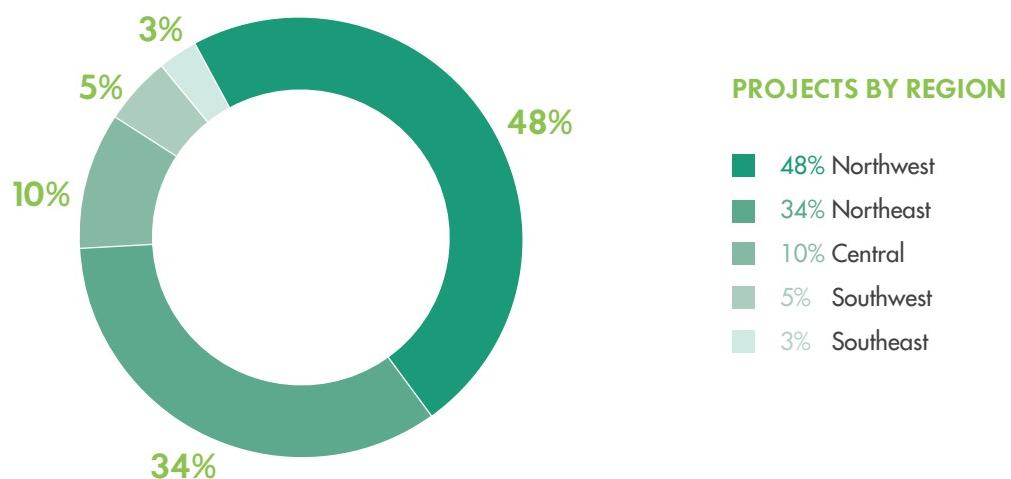
- CANADA
- MEXICO
- UNITED KINGDOM
- CHINA
- JAPAN
- AUSTRALIA
- GERMANY
- FRANCE
- INDIA
- BRAZIL



On the domestic front, MDT continued its work in the group market, attending traditional trade shows such as American Bus Association, Ontario Motorcoach Association, Student Youth Travel Association and more.

FILM OFFICE

The Missouri Film Office works to develop, coordinate and market the film industry and film-related activities in Missouri. The office serves as the central point of contact for all statewide inquiries concerning film, TV shows/segments, documentaries, commercials, web content and digital media.



MOFILM.ORG FILMMAKERS' RESOURCES

1,400+

Location photo listings
representing all Missouri
counties

3,000+

Listings for skilled workers,
equipment and companies
throughout the state

16

Annual film festivals
throughout the state

318

Missouri-based film and TV scripts
submitted to The Missouri Stories
Scriptwriting Fellowship program
over the last six years

38

Film-related programs
at Missouri colleges
and universities

184

Projects assisted, including content
for CNN, Discovery Networks,
History Channel, Hulu, Netflix
and PBS and more

TOURISM EXPENDITURES AND EMPLOYMENT BY COUNTY

COUNTY	NAICS SPENDING	EMPLOYMENT	PROPERTY TAX	CO-OP
Adair County	\$38,896,180.11	1,314	\$821,085.90	\$4,458.00
Andrew County	\$7,354,443.93	119	\$279,716.78	
Atchison County	\$6,538,586.96	131	\$352,563.46	
Audrain County	\$21,852,254.22	552	\$483,712.82	
Barry County	\$41,080,692.03	1,040	\$668,681.08	
Barton County	\$13,018,583.42	376	\$406,751.16	
Bates County	\$12,593,576.53	346	\$478,563.03	
Benton County	\$18,246,504.94	432	\$678,633.61	\$5,999.00
Bollinger County	\$4,151,582.24	94	\$115,012.43	
Boone County	\$425,607,600.08	11,632	\$9,438,035.27	\$99,641.00
Buchanan County	\$186,596,828.15	4,129	\$2,276,052.07	\$69,485.00
Butler County	\$79,160,102.28	1,929	\$1,310,841.65	
Caldwell County	\$1,760,245.53	68	\$121,073.00	
Callaway County	\$47,645,435.27	1,251	\$1,052,920.66	
Camden County*	\$194,328,751.78	3,948	\$8,872,607.33	\$214,438.00
Cape Girardeau County	\$197,260,282.66	4,437	\$2,857,533.75	\$42,495.00
Carrol County	\$7,599,448.89	215	\$284,990.18	
Carter County	\$5,683,387.65	242	\$584,964.27	
Cass County	\$132,023,679.52	3,405	\$6,339,755.48	

COUNTY	NAICS SPENDING	EMPLOYMENT	PROPERTY TAX	CO-OP
Cedar County	\$11,374,978.50	368	\$453,710.41	
Chariton County	\$3,653,346.68	118	\$201,820.96	
Christian County*	\$97,092,240.19	2,450	\$4,498,624.19	w/ Green County
Clark County	\$3,638,118.48	136	\$222,708.85	
Clay County	\$491,283,312.26	12,845	\$14,656,792.91	\$144,663.00
Clinton County	\$7,662,493.78	381	\$771,296.91	
Cole County	\$149,250,181.44	3,675	\$2,535,173.62	\$46,633.00
Cooper County	\$23,321,028.66	802	\$1,354,313.02	\$2,742.00
Crawford County	\$31,279,289.75	551	\$442,016.42	\$19,229.00
Dade County	\$3,435,237.49	109	\$155,686.73	
Dallas County	\$13,703,487.22	296	\$296,413.37	
Daviess County	\$3,343,231.34	79	\$208,760.82	
DeKalb County	\$18,969,827.69	164	\$173,563.83	
Dent County	\$16,159,590.46	328	\$268,122.53	
Douglas County	\$8,513,295.64	208	\$180,596.04	
Dunklin County	\$30,299,726.61	706	\$573,452.41	
Franklin County	\$162,096,436.89	3,916	\$4,583,069.39	\$18,252.00
Gasconade County	\$19,974,913.89	519	\$750,278.17	\$12,000.00
Gentry County	\$3,404,741.48	104	\$130,181.67	

COUNTY	NAICS SPENDING	EMPLOYMENT	PROPERTY TAX	CO-OP
Greene County*	\$800,205,606.85	18,341	\$12,446,851.12	\$316,365.00
Grundy County	\$7,042,225.45	212	\$251,388.84	
Harrison County	\$10,802,697.38	226	\$305,751.00	
Henry County	\$32,323,159.56	759	\$638,462.86	\$7,866.00
Hickory County	\$5,737,760.58	162	\$491,883.92	
Holt County	\$6,117,571.27	87	\$138,024.38	
Howard County	\$4,814,913.46	126	\$106,399.62	
Howell County	\$54,567,501.30	1,319	\$736,750.76	
Iron County	\$6,222,659.85	171	\$168,966.20	\$4,875.00
Jackson County	\$2,248,908,240.84	42,322	\$60,687,448.73	\$337,613.00
Jasper County	\$227,813,277.90	5,103	\$2,910,343.24	\$34,106.00
Jefferson County	\$279,587,447.46	6,203	\$12,189,305.28	
Johnson County	\$65,046,929.97	2,046	\$2,193,855.10	\$10,161.00
Knox County	\$899,100.91	38	\$52,484.07	
Laclede County	\$60,310,676.21	1,229	\$786,617.02	\$24,765.00
Lafayette County	\$28,937,326.04	795	\$959,712.27	\$5,681.00
Lawrence County	\$29,688,269.98	925	\$732,762.69	
Lewis County	\$4,043,488.11	142	\$162,900.95	
Lincoln County	\$46,734,479.35	1,089	\$1,630,073.60	
Linn County	\$10,380,624.96	253	\$222,616.53	

COUNTY	NAICS SPENDING	EMPLOYMENT	PROPERTY TAX	CO-OP
Livingston County	\$19,381,708.06	546	\$381,868.80	\$3,000.00
Macon County	\$20,304,501.47	548	\$599,705.75	
Madison County	\$10,053,457.96	275	\$185,893.80	
Maries County	\$2,883,256.44	39	\$56,981.99	
Marion County*	\$63,430,766.44	1,481	\$1,201,708.13	\$59,985.00
McDonald County	\$13,700,602.81	322	\$146,074.52	
Mercer County	\$437,288.06	5	\$3,877.75	
Miller County*	\$43,638,690.81	731	\$2,192,493.85	w/ Camden County
Mississippi County	\$11,320,806.54	352	\$297,233.63	
Moniteau County	\$8,188,472.70	233	\$304,971.70	
Monroe County	\$3,805,878.50	158	\$393,873.15	
Montgomery County	\$8,047,292.64	244	\$396,737.95	
Morgan County*	\$24,519,058.41	555	\$1,388,267.31	w/ Camden County
New Madrid County	\$26,809,225.30	419	\$377,096.68	
Newton County	\$107,055,467.27	2,122	\$1,348,554.88	
Nodaway County	\$29,225,440.93	935	\$902,228.44	\$14,000.00
Oregon County	\$7,449,358.02	146	\$155,267.66	
Osage County	\$7,459,022.39	200	\$132,122.50	
Ozark County	\$7,841,568.73	243	\$511,713.19	
Pemiscot County	\$9,653,715.01	261	\$248,279.55	

COUNTY	NAICS SPENDING	EMPLOYMENT	PROPERTY TAX	CO-OP
Perry County	\$24,922,089.08	595	\$395,514.40	
Pettis County	\$77,089,555.82	1,687	\$1,214,951.92	\$18,325.00
Phelps County	\$90,155,119.00	2,276	\$1,573,226.81	\$3,000.00
Pike County	\$14,727,076.08	423	\$487,923.24	\$4,250.00
Platte County	\$328,920,894.45	6,031	\$9,610,252.47	\$21,310.00
Polk County*	\$28,916,651.07	583	\$437,011.67	w/ Greene County
Pulaski County	\$81,366,376.39	2,704	\$2,385,462.67	\$46,549.00
Putnam County	\$1,012,413.56	23	\$34,086.87	
Ralls County*	\$5,591,774.66	106	\$51,525.96	w/ Marion County
Randolph County	\$29,601,183.24	594	\$590,719.07	\$10,960.00
Ray County	\$13,028,900.81	370	\$620,573.37	
Reynolds County	\$4,010,318.70	142	\$286,748.43	
Ripley County	\$7,015,765.15	182	\$129,489.85	
Saline County	\$22,803,188.58	635	\$450,396.51	\$2,500.00
Schuylerville County	\$416,904.63	18	\$40,498.72	
Scotland County	\$2,088,230.19	47	\$78,163.64	
Scott County	\$49,522,735.64	1,208	\$873,505.28	
Shannon County	\$7,935,410.98	94	\$72,983.42	
Shelby County	\$2,641,946.96	66	\$93,550.84	
St. Charles County	\$909,458,861.44	21,234	\$34,747,782.90	\$210,113.00

COUNTY	NAICS SPENDING	EMPLOYMENT	PROPERTY TAX	CO-OP
St. Clair County	\$3,619,410.79	84	\$171,821.42	
St. Francois County*	\$97,002,688.16	2,374	\$1,878,867.45	w/ Ste. Genevieve Co.
St. Louis City*	\$1,630,055,140.84	27,229	\$26,704,100.21	w/ St. Louis County
St. Louis County*	\$2,759,992,994.75	61,295	\$19,885,361.70	\$336,613.00
Ste. Genevieve County*	\$17,287,313.00	472	\$424,582.58	\$8,073.00
Stoddard County	\$28,719,656.83	660	\$598,971.62	
Stone County	\$190,054,370.64	2,310	\$7,617,769.61	\$294,372.00
Sullivan County	\$1,946,687.13	21	\$14,664.51	
Taney County	\$584,227,894.38	12,859	\$19,196,168.11	\$347,213.00
Texas County	\$16,297,193.43	398	\$253,091.60	
Vernon County	\$23,540,993.29	500	\$360,497.68	
Warren County	\$35,741,890.38	716	\$1,151,406.65	
Washington County	\$14,865,873.85	281	\$251,783.31	
Wayne County	\$5,930,212.42	233	\$280,155.64	
Webster County	\$34,197,550.77	718	\$578,985.72	
Worth County	\$319,515.97	10	\$24,550.50	
Wright County	\$13,254,856.66	373	\$255,059.31	
TOTALS	\$14,053,522,820.28	304,329	\$312,739,831.26	\$2,801,730.00

*DMO represents more than one county in the Cooperative Marketing Program.

Expenditures in the 45 tourism-related NAICS codes. Source: Missouri Department of Revenue

Employment in the 45 tourism-related NAICS codes. Source: Missouri Department of Labor and Industrial Relations

Property tax on tourism-related businesses within county. Source: Tourism Economics



enjoy the show

VISITMO.COM